

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

18. Set Up/Maintain Receiving Office Codes

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|-------------|-----------------------------------|--|
| 18.1 | Introduction | This procedure describes how to set up and maintain the addresses where goods should be shipped and/or services should be performed. This is the only screen where public ship-to addresses may be created by procurement personnel. The data entered will appear within the list of values of receiving office addresses on the purchase request and purchase order screens. Private ship-to addresses can only be created on the purchase request and purchase order screen and are only available for use by the creator. This information is entered via the CSPS "Receiving Office Codes Maintenance Screen" (PR005). |
| 18.2 | Who Performs the Procedure | Designated procurement personnel will be responsible for entering and maintaining receiving office code information. |
| 18.3 | Initiating the Process | Receiving office code information is entered when new addresses need to be established or existing addresses need to be changed. |
| 18.4 | Accessing the System | From the Main Menu, select Maintenance. From the Maintenance menu, select Procurement. From the Procurement menu, select "PR005 - Receiving Office". Follow the steps below for PR005. |

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- 18.5 Creating a New Receiving Office Code** This procedure describes the steps necessary to create and activate a new receiving office code.

PR005-Receiving Office

Receiving Office Codes Maintenance Screen (PR005)

RECEIVING OFFICE CODE: A1001

NAME: NOAA RECEIVING POINT - A1001

ADDRESS: PERRY DRIVE

ADDRESS:

ADDRESS:

CITY: GAITHERSBURG

STATE: MD ZIP: 44444

COUNTRY: US

☒ ACTIVE DATE: 30-DEC-1998

PREV CANCEL

STEP	ACTION
1.	Click the “Create Record” icon on the toolbar (i.e., the “green plus” icon). A blank record will be created.
2.	Enter a code for the receiving office in the RECEIVING OFFICE CODE field. Note: The rules for establishing this code have not been defined.
3.	In the NAME field, enter the name of the receiving office or “ship to” organization.
4.	In the ADDRESS fields, enter the address for the receiving office.

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STEP	ACTION
5.	In the COUNTRY CODE field, enter the abbreviation for the country in which the receiving office resides. Note: This field must be completed prior to the CITY and STATE fields.
6.	In the STATE field, enter the state in which the receiving office resides.
7.	In the CITY field, enter the city in which the receiving office resides.
8.	In the ZIP field, enter the zip code in which the receiving office resides.
9.	In the ACTIVE field, click the field using the mouse or press the space bar to make the code/address active and available for use. If the receiving office code is inactive, leave this field blank.
10.	The DATE field, reflects the date which the record has most recently been activated or deactivated.

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**18.6 Querying a
Receiving
Office Code**

This procedure describes the steps necessary to query and display one or more receiving office codes.

STEP	ACTION
1.	<p>Click the “Enter Query” icon on the toolbar. Any data on the screen will be removed.</p> <p>To retrieve all records in the system, do not enter data in any of the fields.</p> <p>To retrieve only a subset of records, enter the relevant information in the applicable fields to narrow the search. The ‘%’ character can be used in most fields as a wildcard character. For example, to query all records that include an ‘r’, type %r%.</p>
2.	<p>Click the “Execute Query” icon on the toolbar to execute the query. The system will retrieve all records meeting the specified criteria.</p>
3.	<p>Use the “down” and “up” arrows on the toolbar or on the keyboard to view the retrieved records.</p>

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- 18.7 Printing (Running) the Shipping Code Maintenance Report (i.e., Receiving Office Codes)** This procedure describes the steps necessary to run the “PR709 - Shipping Code Maintenance Report”.

PR709 - Runtime Parameter Form (Shipping Codes)

PR709: Runtime Parameter Form

File Edit Help

Previous Next Run Report Cancel

PR-709

SHIPPING CODE MAINTENANCE

Enter values for the parameters below

Destination Preview

Ship Code ALL

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STEP	ACTION
1.	<p>To run the “PR709 - Shipping Code Maintenance Report”,</p> <p>a. Click the “Printer” icon in the toolbar while the Receiving Office Codes Maintenance Screen (PR005) window is open and active,</p> <p style="text-align: center;">or</p> <p>b. From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select “PR709 - Shipping Codes”.</p>
PR709: Runtime Parameter Form	
2.	<p>To select the destination of the report, click the pull down menu in the DESTINATION field and select the appropriate destination:</p> <p>a. To view the report on the screen, select “Screen”.</p> <p>b. To send the report to a specific file, select “File”.</p> <p>c. To send the report to the printer, select “Printer”.</p> <p>d. To send the report to a mail file, select “Mail”.</p> <p>e. To view the report on the screen, select “Preview”.</p> <p>After selecting the destination, go to Step 3.</p>
3.	<p>To select the ship code for the report, click the pull down menu in the SHIP CODE field and select the appropriate ship code.</p> <p>Note: To run a report for all ship codes, select “All”.</p>
4.	<p>Click the “RUN REPORT” pushbutton to execute the selection made. Proceed to Step 6.</p>
5.	<p>Click the “CANCEL” pushbutton to cancel the report selections made.</p> <p>Note: Upon clicking the “CANCEL” button the Runtime Parameter Form will close and exit the user to the last active screen.</p>

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STEP	ACTION	
	IF...	THEN...
<p>6.</p>	<p>The destination selected is “Screen” or “Preview”...</p> <p>and</p> <p>The “RUN REPORT” pushbutton is clicked...</p>	<ol style="list-style-type: none"> a. To go to the next page of the report, click the “NEXT” pushbutton. b. To go to the previous page of the report, click the “PREV” pushbutton. c. To go to the last page of the report, click the “LAST” pushbutton. d. To go to the first page of the report, click the “FIRST” pushbutton. e. To go to a specific page of the report, enter the page number and then click the “PAGE” pushbutton. f. To print the report, click the “PRINT” pushbutton. g. To send the report to a mail file, click the “MAIL” pushbutton. This functionality is currently not available. h. To close the report, click the “CLOSE” pushbutton. i. To open a second report window, click the “NEW” pushbutton.